

Introduction to MS Dynamics

NAV X. (Discounts)

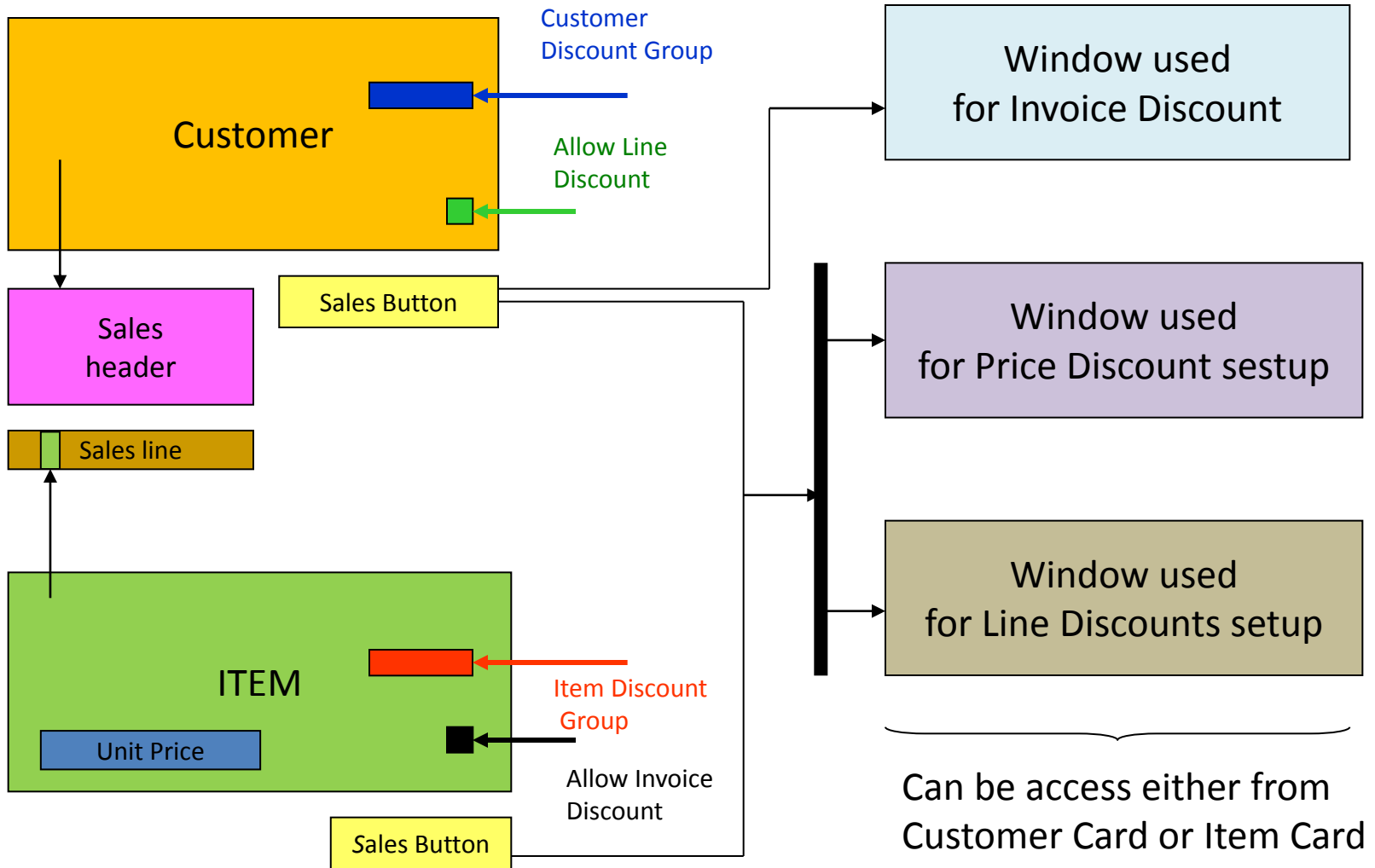
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Discounts

- Use of discounts:
 - Support of „Sales“ actions->lower stock value and better liquidity
 - Support of marketing ->new clients
 - Basic incentives for any type of client
 - In order to differentiate between clients (based on sales in last period or other criteria
 - Types :
 - Price ->modification of Unit Price
 - Line ->change final price in %
 - Invoice Discount ->based on level of invoiced amount

Basic Blocks



Window used for Line Discounts Setup (%)

General Options

Sales Type Filter Customer

Sales Code Filter IC1020

Type Filter None

Code Filter

Starting Date Filter . . .

| Sales Type | Sales Code | Type | Code | Unit of Me... | Minimum Qua... | Line Discount % | Starting D... | Ending Date |
|----------------------|------------|------------------|----------|---------------|----------------|-----------------|---------------|-------------|
| Customer | 10000 | Item | 1920-S | | 5,00 | 3,00 | | |
| Customer | 20000 | Item | 1924-W | | 10,00 | 4,00 | | |
| Customer Disc. Group | LARGE ACC | Item Disc. Group | FINISHED | | 0,00 | 15,00 | | |
| Customer Disc. Group | LARGE ACC | Item Disc. Group | RAW MAT | | 0,00 | 20,00 | | |
| Customer Disc. Group | LARGE ACC | Item Disc. Group | RESALE | | 0,00 | 5,00 | | |
| Customer Disc. Group | RETAIL | Item Disc. Group | FINISHED | | 0,00 | 10,00 | | |
| Customer Disc. Group | RETAIL | Item Disc. Group | RAW MAT | | 0,00 | 15,00 | | |
| All Customers | | Item Disc. Group | A | | 5,00 | 15,00 | | |
| All Customers | | Item Disc. Group | A | | 15,00 | 25,00 | | |
| All Customers | | Item Disc. Group | B | | 25,00 | 15,00 | | |
| All Customers | | Item Disc. Group | B | | 100,00 | 25,00 | | |
| *▶ Customer | | Item | | | 0,00 | 0,00 | | |

Window used for Sales Price Discounts Setup

General Options

Sales Type Filter Customer

Item No. Filter

Sales Code Filter 30000

Starting Date Filter . . .

| Sales Type | Sales Code | Item No. | Unit of Me... | Minimum Qua... | Unit Price | Starting D... | Ending Date |
|-------------------|------------|----------|---------------|----------------|------------|---------------|-------------|
| Customer | 10000 | 1980-S | | 5,00 | 100,00 | | |
| Customer | 30000 | 1988-W | | 2,00 | 800,00 | | |
| Customer Price... | TOP1 | 1988-S | | 20,00 | 90,00 | | |
| All Customers | | 1936-S | | 10,00 | 110,00 | | |
| ▶ All Customers | | 1972-W | | 0,00 | 350,00 | | |

Discount combination

- Price reduced from 100 to 90
- Discount % =10
- Final price after discounts were applied =
 $90 * 0,9 = 81$

Simple example setup

General Options

Sales Type Filter . . . Customer ▼

Sales Code Filter . . . 10000 ▲

Item No. Filter [] ▲

Starting Date Filter . . . []

| Sales Type | Sales Code | Item No. | Unit of Me... | Minimum Qua... | Unit Price | Starting D... | Ending Date |
|------------|------------|----------|---------------|----------------|------------|---------------|-------------|
| ▶ Customer | 10000 | 1980-S | | 5,00 | 100,00 | | |

General Options

Sales Type Filter . . . Customer ▼

Sales Code Filter . . . 10000 ▲

Type Filter None ▼

Code Filter [] ▲

Starting Date Filter . . . []

| Sales Type | Sales Code | Type | Code | Unit of Me... | Minimum Qua... | Line Discount % | Starting D... | Ending Date |
|-------------|------------|------|--------|---------------|----------------|-----------------|---------------|-------------|
| Customer | 10000 | Item | 1920-S | | 5,00 | 3,00 | | |
| *▶ Customer | 10000 | Item | 1980-S | | 6,00 | 5,00 | | |

Simple example- Sales Order

General Invoicing Shipping Foreign Trade E-Commerce Prepayment

No. 1012

Sell-to Customer No. 10000

Sell-to Contact No. CT000001

Sell-to Customer Name The Cannon Group PLC

Sell-to Address 192 Market Square

Sell-to Address 2

Sell-to Post Code/City B27 4KT Birmingham

Sell-to Contact Mr. Andy Teal

No. of Archived Versions. 0

Posting Date 09.09.12

Order Date 09.09.12

Document Date 09.09.12

Requested Delivery Date

Promised Delivery Date

Quote No.

External Document No.

Salesperson Code PS

Campaign No.

Opportunity No.

Responsibility Center BIRMINGHAM

Assigned User ID

Status Open

| Type | No. | Description | Location Code | Reserved Quantity | Unit of Measu... | Unit Price Excl. VAT | Line Amount Excl. VAT | Line Disco... | Qty. to Ship | Quantity Shipped |
|------|--------|--------------------------|---------------|-------------------|------------------|----------------------|-----------------------|---------------|--------------|------------------|
| Item | 1980-S | MOSCOW Swivel Chair, red | BLUE | 1 | PCS | 123,30 | 123,30 | | | 1 |
| Item | 1980-S | MOSCOW Swivel Chair, red | BLUE | 5 | PCS | 100,00 | 500,00 | | | 5 |
| Item | 1980-S | MOSCOW Swivel Chair, red | BLUE | 6 | PCS | 100,00 | 570,00 | 5 | | 6 |

Where $570 = 6 * 100 * 0,95$

Invoice Discount Setup

| | Code | Currency Code | Minimum Amount | Disco... % | Service Charge |
|---|-------|---------------|----------------|------------|----------------|
| ▶ | 10000 | | 500,00 | 5 | 0,00 |
| | 10000 | | 1 000,00 | 6 | 0,00 |
| | 10000 | | 1 200,00 | 7 | 0,00 |
| | | | | | |

SO and when invoice discount is applied

General Invoicing Shipping Foreign Trade E-Commerce Prepayment

No. 1013 Posting Date 09.09.12
Sell-to Customer No. 10000 Order Date 09.09.12
Sell-to Contact No. CT000001 Document Date 09.09.12
Sell-to Customer Name . The Cannon Group PLC Requested Delivery Date
Sell-to Address 192 Market Square Promised Delivery Date
Sell-to Address 2
Sell-to Post Code/City B27 4KT Birmingham External Document No.
Sell-to Contact Mr. Andy Teal Salesperson Code PS
No. of Archived Versions. 0 Campaign No.
Opportunity No.
Responsibility Center BIRMINGHAM
Assigned User ID
Status Open

| Type | No. | Description | Location Code | Reserved Quantity | Unit of Measu... | Unit Price Excl. VAT | Line Amount Excl. VAT | Line Disco... | Qty. to Ship | Quantity Shipped |
|------|--------|--------------------------|---------------|-------------------|------------------|----------------------|-----------------------|---------------|--------------|------------------|
| Item | 1980-S | MOSCOW Swivel Chair, red | BLUE | 10 | PCS | 100,00 | 950,00 | 5 | 10 | |

Order Line **Functions** Posting Print Help

- Calculate Invoice Discount**
- Get Price...
- Get Line Discount...
- Explode BOM
- Insert Ext. Texts
- Get Std. Cust. Sales Codes...
- Reserve...
- Order Tracking
- Nonstock Items
- Copy Document...
- Archive Document
- Move Negative Lines...
- Create Whse. Shipment
- Create Inventory Put-away / Pick...
- Send Approval Request
- Cancel Approval Request
- Release



End of the section X.



This is the end
Beautiful friend
This is the end
My only friend, the end...